

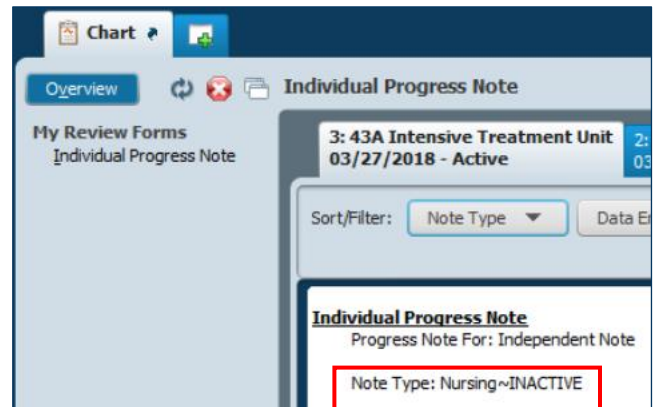
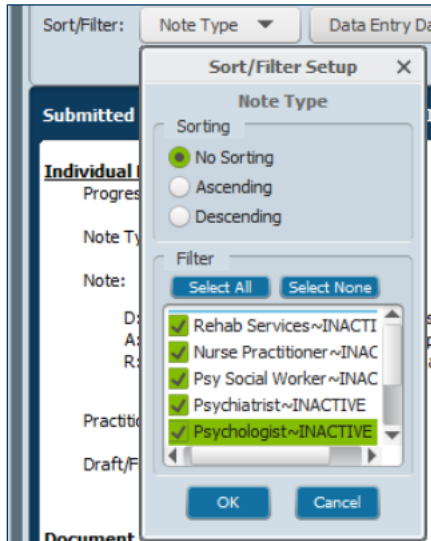
**BHD**MILWAUKEE COUNTY
Behavioral
Health
Division**myAvatar™***Tips and Tricks*

Note Types- Follow these guidelines for selecting and viewing note types in myAvatar. Select the proper note type when completing a Progress or Crisis Progress Note.

| Note Type | Staff that should use Note Type | Description of Note Type's Purpose or Content |
|--|--|--|
| Progress Note | This note is for use by all staff. Most notes will use this note type. | This is the default note type. Any activities without a declarative Note Type should be documented in the Progress Note type. |
| Psychiatric/ Psychological Assessment (eff. 12/17/18) | This note is for use by Psychiatrists, Psychologists, or masters level practitioners. | This is intended to be used in any program or setting where a 90791/90792 billing code is used or for initial inpatient hospital day billing (99221-99223). |
| Care Management | This is for use by Utilization Review and Care Management Staff who do NOT have a clinical treatment relationship. | This note type is for documentation of care oversight coordination activities. Unit or program based social work/human service staff who have a provider/client-patient relationship should continue to document their coordination activities under Progress Notes. |
| Safety Plan | This note is for use by all staff. | This note type is for documentation of safety plans and crisis plans. |
| Treatment Team Note | This note is for use by all staff. | This note type is for documentation of program or department level treatment team staffing meetings to include; facility based treatment planning conference notes, change-in-status staffings, crisis planning staffings and complex case reviews. |
| Legal | This is for use by legal services staff. | This note type is for legal services documentation on Civil Commitment proceeding issues. |
| Crisis Line Contact | This is for use by the Crisis Line personnel. | This note type is used for all documentation of crisis line calls. |
| Crisis Mobile Team | This is for use by the Crisis Mobile Teams. | This note type is used in lieu of the Progress Note for documentation by the Crisis Mobile team staff. |

A. Reviewing Notes in Chart View:

When using the filter to find specific note types, old note types appear as ~INACTIVE. Include these in your filter so that you don't miss pertinent notes. In Chart View, the most recent 100 entries are displayed. Once 100 notes are written using the new note types, the old ~INACTIVE types will drop off the filter list. Similarly, when viewing notes, only the most recent 100 are viewed so in time all notes will have relevant Note Types. The Note Type appears as ~INACTIVE in the body of the note.



B. Reviewing Notes from the Progress Note Widget:

When using the filter to find specific note types, old note types do not appear in the selection drop down list. Choose **All Notes** in your filter so you don't miss pertinent notes. The progress note widget is run by number of days. So, in this example if we run the progress notes for 30 days, we'll want to use **All Notes** until at least July 24th, 2018. By then, the last 30 days will only contain the new note types so we can filter if necessary. If we want to see 365 days of notes, use **All Notes** until at least June 25th, 2019. As above, the Note Type appears as ~INACTIVE in the body of the note.

